<u>Narrative</u> – This checklist will provide step by step instructions for adding information to the Government Classification portion of a vendor's record. For easier instructions, the term W-9 is used throughout, but these steps apply to all forms W-8 or approved Substitute W-9 forms.

<u>Navigation:</u> *Vendors>Vendor Setup/Maintenance>Vendor Information*

<u>Instructions</u> -

1. SetID: SHARE

2. Enter either the vendor id or name.

3. Open the vendor record to the 'Identifying Information' tab.

4. You will be using two links at the bottom of this page (Additional ID Numbers and Government Classifications).

▸ Additional ID Numbers
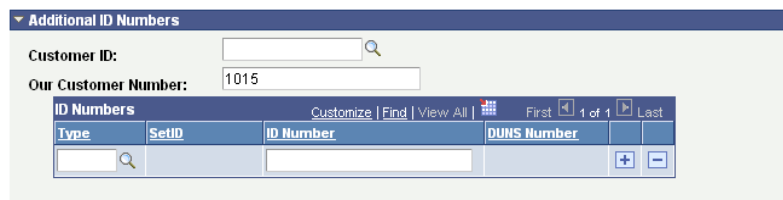▸ Duplicate Invoice Settings
▸ Government Classifications
▸ Standard Industry Codes
▸ Additional Reporting Elements

Expand All   Collapse All

5. Click on 'Additional ID Numbers.' In the 'Our Customer Number' field, enter the last four digits of the TIN, whether social security number or FEIN.

Exception: Do not enter any part of an employee's TIN here.

▾ Additional ID Numbers

Customer ID:
Our Customer Number: 1015

ID Numbers		Customize | Find | View All |	First ◀ 1 of 1 ▶ Last		
Type	SetID	ID Number	DUNS Number		
				+	–

6. Click on 'Government Classifications'. The vendor's organization type and the receipt of the W-9 need to be recorded here.

7. If information already exists in the Government Classifications, tab through the pages to see if 'ORG TYPE' or 'W-9' is already listed.

    a. If either of them do, add a new effective-dated row under 'Government Classifications' and continue to follow the directions below.

8. If there is not an 'ORG TYPE' identified on the vendor; create one by clicking the plus button and selecting "ORG TYPE" from the look-up feature.

9. In 'Gov Class' select the type of vendor from the drop down.

b. Click on the spy glass.

c. Sort by the 'Description' to find all of the classification descriptions that start with 'OT.'

Government Classification: begins with
Description: begins with ot

Look Up   Clear   Cancel   Basic Lookup

Search Results

View All   First ◄ 1-28 of 28 ► Last

SetID	Government Classification	Description
SHARE	58 ORG TYP	OT - Ambulances ND
SHARE	59 ORG TYP	OT - Associations - Out of State
SHARE	70 ORG TYP	OT - Associations ND
SHARE	64 ORG TYP	OT - Banks or Financial Institutions
SHARE	60 ORG TYP	OT - Boards
SHARE	61 ORG TYP	OT - Conferences
SHARE	62 ORG TYP	OT - Consortiums
SHARE	17 ORG TYP	OT - Cooperative Association
SHARE	63 ORG TYP	OT - Cooperatives
SHARE	09 ORG TYP	OT - Corporation
SHARE	55 ORG TYP	OT - Councils
SHARE	51 ORG TYP	OT - Gaming Organization
SHARE	13 ORG TYP	OT - General Partnership
SHARE	22 ORG TYP	OT - Incorporated Non-Profit Organization
SHARE	14 ORG TYP	OT - Individual (non-business)
SHARE	56 ORG TYP	OT - Quick Response Units
SHARE	68 ORG TYP	OT - Rescue Units - ND
SHARE	49 ORG TYP	OT - Tribes
SHARE	50 ORG TYP	OT - Trust
SHARE	16 ORG TYP	OT - Unincorporated Non-Profit Organization
SHARE	65 ORG TYP	OT - Utilities
SHARE	69 ORG TYP	OT - Water Districts -ND
SHARE	18 ORG TYP	OT -Individual/Sole Proprietorship
SHARE	77 ORG TYP	OT-Convention Ctrs & Visitors Bureaua
SHARE	10 ORG TYP	OT-Limited Liability Company
SHARE	11 ORG TYP	OT-Limited Liability Partnership
SHARE	12 ORG TYP	OT-Limited Partnership of LLLP
SHARE	54 ORG TYP	OT-VA LOAN PAYMENT

d. Select the designation (corporation, partnership, sole proprietor, etc.) indicated on the paperwork received from the vendor.

10. If there is not a source of "W-9" identified under Government Classifications, add another row to the Government Sources by clicking on the plus button.

11. Enter 'W' in the source box click on the spy glass and select 'W-9'.

12. In the 'Cert Nbr' field, enter your name and the acronym for your business unit.

13. In the 'Begin Dt:' enter the date on the W-9, and in the 'Expire Dt:' enter the same date, only five years in the future. If the W-9 is undated, use the date your office received the document as the Begin Date.

14. Click 'OK'

15. Click 'Save.'

16. By completing the steps above, other users can now see that a W-9 has been received for this vendor and in which office (VRO, college, university) the document is filed. It also tells other users the organization type (necessary for proper 1099 reporting), and the date five years in the future when this vendor will need to be contacted for an updated W-9.

17. Other fields and screens may need to be completed because of the W-9 received. See the checklists for:

   Sole Proprietorships
   Entering TIN and Name
   Adding 1099 Information to Existing Vendors
   Guardianships and W-9 Forms

Feel free to contact the Vendor Registry Office at spovendor@nd.gov for any type of help or guidance in entering vendor information. The Vendor Registry Office will research the change, take the appropriate action and respond to your inquiry in a timely manner.